What are Inquiry Reports?
A suite of tools used to inquire on commonly used codes and values.

What can I learn from the Inquiry Reports?
The Inquiry Reports site puts a suite of robust inquiry tools for codes and data used across UCSF financial systems in one central location; the inquiries are available for use without logging in to a system. These tools provide access to quickly look up:

- Chart of Accounts Related Information
  - Look up entries for chartfields
  - Get information on Combo Edits in PeopleSoft
  - Look up Department Roles
  - Look up Source Codes
  - Access the Conversion Mapping Lookup Tool
  - Look up SpeedTypes

- Contracts & Grants Related Information
  - Easy access to F&A Base Codes and Rate information

- HR, Payroll & Benefits Related Information
  - Display current Composite Benefit Rates
  - Look up and Filter DOS Codes
  - Look up and Filter Title Codes

How do I Access Inquiry Reports?
- From the Controller’s Office website by clicking on the Inquiry Reports tab
- Or from MyReports by clicking on the Inquiries tab and link on the tab

Tips & Tricks – All Inquiries
- To access a report, simply click on the name link:
  - Note that while most reports load dynamically in the same window, there are links to some inquiries that will open in a new window or tab; close the new tab when you have completed using the specific inquiry tool and the Inquiry website will stay open in the previous tab/window
  - You can use the “breadcrumbs” to return you to the report inquiry page:

Tips & Tricks - Chart of Accounts Related
- Business Unit and Function lookups do not include search functionality due to the limited number of Business Units and Function codes in use. All values are displayed.
- To search in all other chartfields:
  1. Enter search terms in either the chartfield code field, and/or description field
  2. To include inactive codes, select the Include Inactive checkbox.
  3. Once you have entered your desired parameter(s), click the Search button
- You can enter partial codes or descriptions and the search will display all items that include the search parameter.
The roadmap below shows the different functionality available:

- In addition to the "breadcrumbs" navigation, you can navigate between chartfield inquiries using the chart of accounts display:

Tips & Tricks - Codes

- **Source Code**, **DOS Code**, and **Title Code** inquiries display the entire list of results, and allow for filtering for specific criteria. In this situation, enter your criteria into the filter box to narrow down the list in real time. This can be a partial description or number. Filtering functions the same regardless of the item being filtered (the following example is Source Code):

Tips & Tricks - SpeedTypes

- Use the SpeedTypes inquiry to access the SpeedType Search and Chartfield Validator or to learn more about SpeedTypes
  - Note: Although the SpeedType search and validation is very intuitive, more information is available in the “SpeedType Search and Chartfield Validator” job aid.